

From: SCEIS
Sent: Wednesday, October 30, 2013 8:52 AM
Cc: SCEIS
Subject: SRM 7.2 Freeze / Cutover Activities

To: AST Leads, Procurement Directors, Finance Directors

CC: SCEIS Team, SCEIS Service Desk

ATT: [“Sample Documentation for Freeze Period.xlsx”](#)

As you know, implementation of the Supplier Relationship Management (SRM) 7.2 upgrade is underway and go-live is scheduled for November 25, 2013. Before go-live, a cutover, or freeze period, is necessary to validate and finalize data to be loaded into the new SRM 7.2 system. The cutover period for SRM 7.2 will begin at 5:00 p.m. on Friday, November 8, and will continue through the opening of business on Monday, November 25.

User Activities during Cutover

- Users will NOT be able to log into SRM. All functionality in the SRM system will be unavailable: shopping carts (including internal goods and services requested from the warehouse), shopping cart approval, bidding, and vendor bid response.
- Users will NOT be able to create purchase orders or contracts in ECC during the cutover period. Users will have access to display existing purchase orders and contracts in ECC for reference during the freeze period.
- Payments in process during the cutover period will not be affected by the freeze. Payment in process means that the invoice has been entered and approved by the Accounts Payable staff and the agency and payment is being processed by the Comptroller General's Office.
- Throughout the cutover period, payments against a purchase that does not reference a contract can be processed for payment. If the purchase order does not reference a contract, invoices can be entered, purchase orders can be changed, and goods receipts entered in order to process payments (this includes invoices for inventory items).
Note: A purchase order references a contract when the buyer creates a purchase order from a shopping cart that used the contract search to pull in the contract number or when the buyer added the contract number to the purchase order.
- Emergency purchases should be made in compliance with the SC Procurement Code §11-35-1570 & Regulation 19-445-2110. If an emergency purchase is necessary during the freeze, the data must be entered into SCEIS after go-live.
- If a purchase is not an emergency but must be made, agencies should be aware that the Policy for Use of Purchasing/Payment Document Types will be enforced.
- If other procurement processes are necessary, such as issuing a solicitation, evaluating bids, or issuing an award statement, the agency can use a documented manual process and enter the data into SCEIS after go-live. A [sample spreadsheet](#) is attached that you can

adapt to your own needs. This spreadsheet is an optional tool for manually tracking processes.

- Agency inventory warehouses will be able to transfer material from plant to plant, transfer material from storage location to storage location, process sales orders, receipt a transfer, and create a goods issue. Direct pay or P-card should not be used for inventory items.
- Users will be able to use funds reservations and make direct payments.
- During the two week freeze period for the SRM 7.2 Upgrade from November 8 to November 25, agencies should be aware that the Policy for Use of Purchasing/Payment Document Types will be enforced. Invoices entered in ECC to be paid by the direct payment method during the freeze period will be reviewed individually by the Comptroller General's Office to determine if payment should be made using direct pay or Purchase Order. Agencies should plan for the two weeks freeze period to avoid any rejected payments.
- During the cutover period, agencies will be asked to validate contract data extractions. The SCEIS Team will provide more information on the timing and details of this activity closer to the cutover period to ensure agencies are prepared to complete data validation tasks.
- Users will also continue to have access to MySCEmployee or Citrix.

Vendor Activities during Cutover

- During the cutover, vendors will not have access to enter or view solicitations and they will not have access to Vendor Registration. Vendors are encouraged to download any documentation prior to the freeze period; however, vendors will be able to continue to contact Agencies and the Procurement Services Division as normal.
- Agencies are advised to close solicitations prior to the cutover period or extend the closing dates beyond November 25 and to notify vendors of the restrictions to vendor activity from November 8 at 5:00 p.m. until opening of business on Monday, November 25. During the freeze period, agencies can continue to follow their normal procurement process by using methods outside of SCEIS (paper, e-mail, and facsimile) and in compliance with the SC Consolidated Procurement Code & Regulations. If purchases or other procurement activity are made during cutover, agencies must enter data into SCEIS after go-live. It is recommended that these activities be planned with the freeze period in mind.

User Activities After Cutover

- Beginning on November 25, all new purchase orders will be created in SRM.
- Since purchase orders created in ECC will not be migrated to SRM 7.2, agencies will have parallel access to purchase orders until the end of the 13th month. Access to purchase orders in ECC will be provided through a folder in SRM 7.2. Users will be able to process payments against purchase orders. Users will be able to enter invoices, change purchase orders, and receive goods against purchase orders. By the end of the 13th month all purchase orders created in ECC must be blocked and final invoiced.

- Active purchase orders created in ECC before 5:00pm November 8 will have to be manually entered in SRM 7.2 for fiscal year 15.
- Shopping carts created in SRM 5.0, but not approved, will be inactive in SRM 7.2 and will have to be re-entered (can be copied from old shopping carts) at Go-Live.
- Shopping carts which were initiated in SRM 5.0 and approved will be active in SRM 7.2 at time of Go-Live.
- Solicitations begun in SRM 5.0 can be accessed and continued in SRM 7.2.

Agency Check List for Cutover Period Activities

(Close of Business Friday, November 8, to Beginning of Business Monday, November 25, 2013)

- _____ Communicate with your agency users about the Cutover or Freeze Period.
- _____ Set a firm deadline within your agency for receipt of shopping carts that will be processed before Cutover.
- _____ Plan ahead to purchase frequently-used items and inventory stock, to avoid the need to order during the Freeze.
- _____ Plan so that the Freeze period coincides with an extended procurement process such as bid opening, bid evaluation, award and/or protest period, if possible.
- _____ Receipt all goods before November 8, if possible.
- _____ Enter all invoices for payment as soon as they are received before November 8.
- _____ Develop manual processes to handle unplanned procurement processes, in case they occur, and to ensure that all data are captured for entry into SCEIS after go-live.
- _____ Maintain all back-up documentation related to procurement process for scanning into SCEIS with data entry after go live.
- _____ Post a notice of Freeze on your agency's website, if available.
- _____ Communicate with your vendors to notify them of Freeze period.

Please share this information with all SCEIS Materials Management (MM) users in your agency to ensure they are familiar with the timing and impacts of the SRM 7.2 upgrade cutover period.

If you have any questions about this message, please email them to sceis-ast@sceis.sc.gov.